MARKET RESEARCH STUDY ON

THE MEXICAN MARKET FOR

FOOD PROCESSING AND PACKAGING EQUIPMENT

This market study has been prepared to assist Canadian firms interested in exporting to Mexico. While an effort has been made to examine the most important aspects of the sector, the study is not exhaustive. Companies will have to tailor their marketing approach according to their particular interests and circumstances.

Further assistance can be obtained by addressing requests directly to the Commercial Division of the Canadian Embassy in Mexico City located at Calle Schiller No. 529, Col. Polanco, 11580 Mexico, D.F., telephone (011-525) 254-3288, telex 177-1191 (DMCNME) and fax (011-525) 545-1769 (sending from Canada); or the Latin America and Caribbean Trade Division, External Affairs and International Trade Canada, 125 Sussex Drive, Ottawa, Ontario, K1A 0G2; phone (613) 996-8625; fax (613) 943-8806.

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INDEX

PAGE

1. BACKGROUND

When the Spaniards first visited the market of Tlaltelolco in the early 16th century, they were greatly surprised at the amount and variety of food products sold there, ranging from natural produce to semi-prepared items, such as chocolate and dried meat, and ready-to-serve dishes. The Aztecs processed their foods for the local market only. Although the Spaniards realized that, in order to endure the great distance between settlements in Mexico, foodstuffs would have to be cured or treated in some way and packaged, no organized food processing and packaging industry was ever developed in Mexico during colonial times. Food processing and packaging came to the country much later on, with imports of technology and equipment from Europe and the United States.

Mexico has since then been very dependent on the importation of capital goods and this market sector is not an exception. The participation of imports in total consumption has been increasing in response to more liberal trade regulations, general economic growth, reduced inflation and devaluation rates, and a demand backlog for new machinery that had built-up since the 1982 economic crisis. While imports represented 64% of total supply in 1987, or $104.5 million, by 1990, their share grew to 73.4% and they amounted to $267.3 million, reflecting an average annual growth rate of 37% during that three year period. Further, the import share of the market is expected to increase from the present 78% to 81% in 1992. Total apparent consumption of food processing and packaging machinery and equipment has also undergone a rapid growth, increasing from $159.1 million in 1986 to the present $368.1 million. Although such high growth patterns are not expected to continue in the years to come, an average 7% growth rate is estimated for the 1991-1994 period.

2. ECONOMIC ENVIRONMENT

With the objective of reducing the inflation rate, the Mexican authorities implemented a stabilization program in 1988, called the Economic Solidarity Pact, which features traditional austerity measures, entailing tight fiscal and monetary policies and unorthodox measures, such as price, wage and exchange rate controls. This program has been the cornerstone of Mexico's economic policy over the past four years and has resulted in a drastic reduction of the inflation rate, from an annual rate of 159% in 1987 to 51.7% in 1988 and 19.7% in 1989. Inflation rebounded to 29.9% in 1990 but was brought down to 18.5% in 1991 and is expected to be of 10% to 12% in 1992. Along with the objective of consolidating the progress made in price stabilization, Mexico's macroeconomic policy in 1992 aims to reaffirm gradual and sustained economic recuperation, basically by establishing the necessary conditions to encourage national and foreign investment and by stimulating local demand.

After the 1986 recession, Mexico's gross domestic product (GDP) increased a moderate 1.5% in 1987 and an additional 1.4% in 1988. Domestic economic activity recovered for the third consecutive year in 1989 with a growth rate of 3.1% and further 3.9% in 1990 to reach $234 billion (1). With an 81.1 million population, per capita GDP was estimated at $2,874 in 1990. Additionally, manufacturing output grew by 5.2% in 1990 in real terms, private investment and consumption expanded 13.6% and 5.2% respectively and public investment was up 12.8%. During the 1991-1994 period GDP is expected to maintain an average annual growth rate of 4%-5%. Preliminary figures place GDP growth at 4% for 1991 and a similar growth rate is anticipated for 1992.

In an effort to revitalize and open the Mexican economy, the Mexican Government undertook a series of structural changes, including the accession to the General Agreement on Tariffs and Trade (GATT) on August 24, 1986 leading to an extensive trade liberalization process: import permits were eliminated on all but 325 of the total 11,950 tariff items based on the Harmonized System adopted in 1989. Official import prices are no longer applicable, nor the 5% export development tax, and import duties were lowered from a maximum of 100% in 1982 to 20% in January 1988. The weighted average tariff rate is now 10.4%. The automotive and computer industries have also been liberalized, through the elimination of prior import permits, to allow free entry of products in these industries. The approval of the North American Free Trade Agreement will further strengthen trade between Canada, the United States and Mexico.

According to official data from the Mexican Secretariat of Commerce and Industrial Development (SECOFI), Mexico's trade balance in 1990 dropped once again to a $3 billion deficit from -$645 million in 1989. Exports increased by 17.5% in 1990, from $22.8 billion to $26.8 billion, while imports grew 27.3%, from $23.4 billion to $29.8 billion in 1990, having already increased 91.8% from $12.2 billion in 1989. In 1991, total exports increased 2.6% to $27.6 billion, while imports grew 22.2% to $38.0 billion, generating a $10.4 billion deficit.

Total Mexican imports from Canada increased 24% in 1989, then decreased 1.5% in 1990 and again by 26% in 1991. Total Canadian exports to Mexico amounted to Cdn$594 million in 1990 and Cdn$440.8 million in 1991, while total Canadian imports from Mexico were valued at Cdn$1,730 million in 1990 and Cdn$2,574 million in 1991. According to Mexican figures, in 1990, 1.6% of Mexico's imports came from Canada, while 0.8% of its exports were to Canada. This makes Canada Mexico's sixth largest exporter and fifth largest importer.

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1. Note: All values in this report, unless otherwise stated (Mexican pesos, Mex$, Canadian dollars, Cdn$, etc) are quoted in United States dollar equivalents.

3. MARKET ASSESSMENT

Total apparent consumption of food processing and packaging equipment, including parts, was $197.9 million in 1988, up 21% from $163.3 million in 1987. In 1989, the market grew again by 25.8% to $248.9 million, and 1990 showed a further increase of 36.3%. Demand is estimated at $368.1 million in 1991. This considerable increase was due to the continuous growth in imports that has resulted from more liberal trade regulations (in particular the reduced import tariffs), the general economic growth, the reduction in inflation and devaluation rates, and the pent-up demand for new machinery that had built-up since the 1982 economic crisis. Although it is unlikely that such a high rate of growth will continue in the future, an upward trend is expected, placing total apparent consumption at $455.4 million in 1994, after an average annual increase of 7% per annum.

TABLE 1
THE MEXICAN MARKET FOR FOOD PROCESSING AND PACKAGING MACHINERY & EQUIPMENT
(thousands of dollars)

	1987	1988	1989	1990	1991e	1994p
Production	66,494	75,092	81,704	92,017	97,775	113,187
+ Imports	104,493	135,954	182,618	267,316	294,048	370,416
- Exports	7,717	13,130	15,439	20,169	23,716	28,246
TOTAL	163,270	197,916	248,883	339,164	368,107	455,357

Note: e=estimated; p=projected
Source: Import, export data by Secretaría de Comercio y Fomento Industrial (SECOFI); author's estimates.

Domestic production has been limited to small and medium size equipment, based mostly on simple technology, which only performs one step or one portion of the food processing chain. Nevertheless, it has been improving both in terms of its international competitiveness and level of technology. Mexico's production has been growing steadily and has not only found a domestic market but a growing export market. Local supply, however, will continue to grow at a relatively slower rate than imports, increasing only five percent annually to reach $113.2 million in 1994. Of this amount, 25% will be exported.

Imports have played a crucial role in this market and their participation in total consumption has been increasing in response to the factors mentioned above. While imports represented 64% of total supply in 1987, or $104.5 million, by 1990, their share grew to 73.4% and they amounted to $267.3

million, reflecting an average annual growth rate of 37% during that three year period. During 1991, they are estimated to have increased another 10% and imports are expected to grow at an average eight percent per year between 1991 and 1994. The import share of the market is expected to increase from the present 78% to 81% in 1992.

The following table shows imports of food processing and packaging equipment between 1988 and 1990.

TABLE 2
MEXICAN IMPORTS OF FOOD PROCESSING AND PACKAGING EQUIPMENT
($000 dollars)

	1988	1989	1990
FOOD PROCESSING EQUIPMENT & PARTS			
Cooking & heating process eq.	29,533	38,811	46,234
Scales	3,831	6,551	9,647
Cleaning, sorting & grading eq.	990	491	1,271
Milk & dairy eq.	7,622	6,457	9,092
Beverage making eq.	560	671	405
Brewery eq.	122	830	3,148
Flour, seed & grain mill eq.	3,875	6,674	7,544
Bakery eq.	5,516	11,935	27,542
Bakery ovens	5,629	6,213	8,362
Chocolate & confectionery eq.	2,757	5,640	5,171
Sugar manufacture eq.	296	2,079	826
Fruits, nuts & vegetable proc. eq.	938	1,744	5,601
Fats & oil manufacturing eq.	1,262	4,092	3,450
Meat & poultry processing eq.	6,430	10,624	11,829
Fish processing eq.	449	95	63
Mixing, stirring, homogenizing eq.	11,258	8,269	11,304
Other food processing equipment	7,098	3,852	2,749
Other parts	2,520	5,028	5,313
TOTAL FOOD PROCESSING EQUIPMENT	**90,686**	**120,056**	**159,551**
FOOD PACKAGING EQUIPMENT			
For cleaning & drying containers	762	2,419	6,674
For filling, closing, sealing, capsuling & labelling	22,474	32,026	59,265
For packing & wrapping	11,699	13,558	25,338
Parts for packaging equipment	10,333	14,559	16,488
TOTAL FOOD PACKAGING EQ.	**45,268**	**62,562**	**107,765**
GRAND TOTAL	**135,954**	**182,618**	**267,316**

Source: Import data published by SECOFI

The growth of imports is expected to be faster in the case of food processing than of packaging equipment, largely because Mexican manufacturers have been more successful in producing the latter. This is due in part to the smaller, less sophisticated and less automated nature of this equipment. However, this does not mean that imports are limited to highly sophisticated equipment. On the contrary, the strongest demand is for medium sized machines and automatic and semi-automatic equipment at reasonable prices.

The most important types of packaging used in Mexico are: rigid and semi-rigid containers (75%), flexible packaging (18%) and others (7%) such as metal and cork. Four materials, paper & cardboard, plastics, glass and metal, cover 90% of all packaging needs. Paper & cardboard are used for corrugated and solid-fiber containers, folding cartons, set-up boxes, composite cans, tubes, drums, bags, sacks, sterile packaging and wrapping paper. Glass is widely used for bottles, flasks, ampules and tubes. Plastics are used for semi-rigid containers, such as bottles and flasks, and for flexible packaging such as bags, sacks and plastic film. Metal is used for tin and aluminum cans, containers, drums and pails. During 1986, the food packaging industry purchased five billion tin cans, two billion glass bottles, 300 billion cardboard boxes and seven billion labels. The most important Mexican companies which supply packaging materials are Vitro (glass), Mexicana de Envases, Envases de Hoja de Lata, Industria Metálica del Envase, La Continental and Cartón y Papel.

The U.S. has always been the largest foreign supplier of food processing and packaging equipment to Mexico for the following reasons: its geographical proximity to Mexico allowing better service and availability of replacement parts and faster and cheaper delivery; the familiarity of the Mexican end user industry with U.S.-made equipment; and the international price competitiveness of its equipment. The U.S. accounts for an average 55% of the total import market, followed by West Germany (15%), France (5%) and Italy (10%), who have made forceful efforts to increase their market share through direct promotion of their products, high quality equipment and service, flexible credit and financing terms, a variety of options in technology and processes and technical advisory and consulting services.

Canadian companies have been almost absent in this market, as shown by total exports to Mexico of Cdn$1.7 million in 1989, Cdn$1 million in 1990, and Cdn$1 million in 1991, as follows:

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The most important types of packaging used in Mexico are: rigid and semi-rigid containers (75%), flexible packaging (18%) and others (7%) such as metal and cans. Four materials, paper & cardboard, plastics, glass and metal, cover 95% of all packaging needs. Paper & cardboard are used for corrugated and solid-fiber containers, folding cartons, set-up boxes, composite cans, tubes, drums, bags, sacks, flexible packaging and wrapping paper. Glass is widely used for bottles, flasks, ampules and tubes. Plastics are used for semi-rigid containers, such as bottles and flasks, and for flexible packaging such as bags, sacks and plastic film. Metal is used for tin and aluminum cans, containers, drums and pails. During 1985, the food packaging industry purchased five billion tin cans, two billion glass bottles, 200 billion cardboard boxes and seven billion labels. The most important Mexican companies which supply packaging materials are Vitro (glass), Mexicana de Envases, Envases de Hoja de Lata, Industria Metálica del Envase, La Continental and Cartón y Papel.

The U.S. has always been the largest foreign supplier of food processing and packaging equipment to Mexico for the following reasons: its geographical proximity to Mexico allowing better service and availability of replacement parts and faster and cheaper delivery, the familiarity of the Mexican end user industry with U.S.-made equipment, and the international price competitiveness of its equipment. The U.S. accounts for an average 55% of the total import market, followed by West Germany (15%), France (5%) and Italy (10%), who have made forceful efforts to increase their market share through direct promotion of their products, high quality equipment and service, flexible credit and financing terms, a variety of options in technology and processes and technical advisory and consulting services.

Canadian companies have been almost absent in this market as shown by total exports to Mexico of Cdn$3.7 million in 1989, Cdn$1 million in 1990, and Cdn$1 million in 1991, as follows:

TABLE 3

CANADIAN TRADE OF FOOD PROCESSING AND PACKAGING EQUIPMENT WITH MEXICO
(000 Cdn $)

CANADIAN EXPORTS TO MEXICO	1988	1989	1990	1991
Bakery & pasta making eq.	5	0	0	0
Sugar manufacturing eq.	0	0	0	142
Meat processing eq.	0	147	0	0
Dairy eq.	3	0	6	0
Seed, grain & cereal proc.	59	426	21	8
Mixing, stirring, eq.	27	28	327	23
Other food processing eq.	0	53	8	17
Parts for food processing eq.	76	321	3	0
Heating & cooking eq.	496	590	344	277
Food packaging eq.	187	99	282	523
TOTAL	853	1,664	991	990

CANADIAN IMPORTS FROM MEXICO	1988	1989	1990	1991
Bakery & pasta making eq.	1	3	0	0
Confectionery eq.	0	0	52	0
Parts for food processing	0	2	0	0
Heating & cooking eq.	167	399	475	531
Food packaging eq.	544	432	68	107
TOTAL	712	836	595	638

Source: Statistics Canada - International Trade Division

It is important that Canadian manufacturers undertake serious marketing and promotion efforts in order to penetrate this growing market. It is important that they be more aggressive and offer more liberal license arrangements and credit policies; that they offer all ranges of technological sophistication and that they be willing to incorporate their equipment into production lines including other brands and origins; and that they offer excellent service and pre-sales advice. It is also recommended that they participate in trade fairs and exhibitions in order to further establish their presence, promote their products, inform end users about new technologies and create a renewed image in the Mexican market.

Opportunities to export exist in all categories of food processing and packaging equipment. Some of the products with high market potential include machinery for the soft drinks industry, grading and sorting equipment, pasteurizers, dairy product machinery, cream separators, wine, cider and juice manufacturing equipment, machinery for the preparation of fats & oils, bread industry equipment, sugar manufacturing equipment, brewery equipment, meat cutting & slicing equipment, sausage making equipment, machinery for the preparation of fruits nuts &

vegetables, fish & shrimp processing equipment, mixers & beaters, scales, heat exchange units, evaporators, pasteurizers, glass bottle cleaners and other container washing machines, dairy product packing equipment, bagging machines, corking & capping equipment, vacuum packing equipment, liquids packing equipment and labelers. Other areas that have been identified as potentially good are refrigeration equipment, both stationary and in transportation units, conveyors, cleaning equipment, and food and waste reprocessing equipment, of which there is presently very little. Food waste reprocessing equipment is of particular interest to Mexican importers due to the significant volume of organic waste that is generated every day by food processing plants and supply centers and the high costs of disposing of this waste.

4. END USER SECTORS

The local processed food and beverages industries employ over 180,000 people in several thousand companies, although it is a relatively concentrated industry, with a small number of very large firms controlling the vast majority of sales, and a myriad of small industries. The Mexican food processing sector is dominated to some degree by American and, to a lesser extent, European multinational firms, which all have wholly owned, joint venture or licensed production plants in Mexico. Rather than importing, these companies utilize Mexican raw materials and American or European processing, packaging and marketing technology to manufacture the product in their plants in Mexico for sale in Mexico and in some cases for export to the United States and Europe.

This industry group is one of the least sensitive to general economic conditions, since it satisfies the more basic needs of Mexico's growing population. It has a tendency to grow according to demographic trends and its growth rate usually exceeds that of the economy as a whole. During the 1975-1986 period, it grew 4.3% as compared to a total GDP growth of 3.9% In 1986, during the economic crisis, it decreased by 0.5%, then remained practically stagnant until 1989, when it grew 7.5% and again by an estimated 14% in 1990.

The following table shows total gross production of the Mexican food processing industry between 1980 and 1987, the last year for which data are available, according to the National Institute for Statistics, Geography and Computers (INEGI):

TABLE 4

GROSS DOMESTIC PRODUCTION OF FOODS
(billion current Mexican pesos)

YEAR	AMOUNT	NOMINAL CHANGE	REAL CHANGE
1980	571.6	29.3%	5.5%
1981	739.2	58.0%	5.2%
1982	1,167.7	92.8%	0.7%
1983	2,250.8	79.6%	2.2%
1984	4,043.2	65.3%	2.4%
1985	6,683.6	78.8%	0.2%
1986	11,949.6	125.2%	(0.8%)
1987	26,914.4		

Source: Instituto Nacional de Estadística, Geografía e Informática.

As can be seen from the above table, growth in the industry tends to be pro-cyclical and to grow with the economy as a whole, but it does not undergo major fluctuations, since one of its principal determinants is total demographic growth.

Total gross production by the food industry amounted to $26.9 trillion pesos or $18.3 billion dollars in 1987, broken down as follows:

TABLE 5

TOTAL GROSS PRODUCTION OF THE
MEXICAN FOOD INDUSTRY - 1987
(billion Mexican pesos
million US dollars)

CATEGORY	PESOS	DOLLARS	%
Meat & milk	9,474.7	6,445	35.2%
Processed fruits & vegetables	944.6	643	3.5%
Wheat milling	3,238.1	2,203	12.0%
Corn milling	4,878.0	3,318	18.1%
Coffee	1,586.9	1,080	5.9%
Sugar	1,480.5	1,007	5.5%
Fats & oils	1,712.5	1,165	6.4%
Animal feed	658.6	448	2.4%
Other	2,940.9	2,001	10.9%
TOTAL	26,914.8	18,310	

Source: Instituto Nacional de Estadística, Geografía e Informática.

As can be seen, meat and milk production dominate the total food market, with a 35.2% participation, which corresponds mostly to milk. This is followed by corn milling, since the tortilla is the base of Mexican foods consumption, and wheat milling for the production of bread, cookies and pasta, which also represent a significant part of the diet. This is followed by oils and fats, mostly used for cooking, coffee and sugar, 50% of which is consumed in bottled drinks, followed by the bread and cookie and the confectoinery industries.

Between 1985 and 1990, the percentage growth of food and beverage production, based on the manufacturing production index, was as follows:

TABLE 5
GROWTH OF FOOD AND BEVERAGE PRODUCTION
(percentage)

CATEGORY	1986	1987	1988	1989	1990
Total foods & beverages	1.8	0.7	(0.3)	5.8	14.2
Meat & milk	4.1	(2.7)	(5.5)	11.9	13.9
Processed fruits & vegetables	0.8	(0.4)	(7.7)	11.9	13.9
Wheat milling	(1.2)	(0.2)	(2.2)	4.0	4.7
Corn milling	3.5	3.3	2.1	1.6	3.0
Coffee	6.0	1.3	3.9	12.2	54.4
Sugar	14.1	4.1	(10.6)	(4.3)	128.9
Fats & oils	(14.0)	1.7	4.6	(0.2)	10.1
Animal feed	(0.5)	(0.3)	2.1	1.4	(1.5)
Other foods	12.9	(2.5)	3.5	2.2	7.9
Alcoholic beverages	(10.4)	8.3	(0.8)	8.1	(20.6)
Beer & malt	2.0	5.8	6.2	16.7	(5.8)
Soft drinks & sodas	(6.4)	(3.6)	8.8	16.2	(4.4)

Source: Banco de México - INEGI

As can be seen, there are large fluctuations from one category to the next. Corn milling, the base of the Mexican diet and an area in which government intervention is high, through controlled prices, and the CONASUPO, the government owned National Council for Popular Subsistence, which produces corn flour and tortillas at subsidized prices, has shown a contnuous increase, despite critical economic conditions. Coffee production and processing also showed only positive growth rates, since it is principally linked to world prices of coffee and the massive consumption of coffee by large multinational firms, su... as Nestle. Wheat milling showed the least fluctuations, being a basis of the Mexican diet, in particular of the low income population, while sugar and beverages have been fluctuating very much in the past few years.

The following table shows 1989 total sales by a sample of companies in the food and beverage industries by type of product:

TABLE 6
SALES BY THE FOOD AND BEVERAGES INDUSTRIES
1989
(billion pesos, million dollars)

CATEGORY	# COMPANIES	SALES (pesos)	SALES (dollars)
Total food sales	425	15,538.6	6,258.0
Fats & oils	51	3,001.9	1,209.0
Milk	37	2,623.9	1,056.7
Wheat milling	93	1,575.8	634.6
Processed meats	61	1,450.7	584.3
Animal feed	50	1,088.2	438.3
Fruits & vegetables	30	1,053.0	424.2
Cookies,crackers,pasta	23	999.4	402.5
Concentrates, syrups & colourings	7	769.3	309.8
Coffee & tea	3	567.9	228.7
Starch & yeast	11	501.5	202.0
Corn flour	12	463.1	186.5
Sauces & soups	4	456.3	183.8
Chewing gum	6	364.0	146.6
Fish & crustaceans	33	317.7	128.0
Cocoa & chocolate	4	305.8	123.2
Total beverage sales	157	8,691.0	3,500.2
Beer	18	3,665.8	1,474.6
Soft drinks & other non alcoholic	76	3,267.3	1,315.9
Brandy, wine & grape bev	29	788.6	317.6
Distilled cane bev.	6	373.3	150.3
Malt	6	259.3	104.4
Tequila & agave bev.	12	221.1	89.0
Vodka, gin & other dist.	10	115.7	46.6

Source: Agenda Estadística 1990 - INEGI

Although this table does not reflect total sales value of the industry, since it is based on a sample, it still is very useful to determine sales, since, as I noted before, production in this industry is concentrated in a small number of very large firms. As can be seen, the fats and oil and the milk industries dominate total sales of food products, followed by wheat milling, meat, animal feed, bread, cookies & pasta and canned fruits and vegetables. In the beverages industry, clearly beer and soft drink sales dominate the market.

During the 1980-1988 period and in 1989, the percentage nominal growth in production of selected manufactured food products was as follows:

	80-88	1989
Rum	119.5	18.1
Starches	46.3	4.6
Oils & fats	33.0	8.9
Chewing gum	25.6	67.4
Corn flour	23.6	21.1
Meats	18.8	30.1
Soups & sauces	17.3	NA
Beer	16.3	28.2
Soft drinks	8.3	26.5
Chocolate	7.8	37.3
Wheat	4.2	19.1
Milk	3.0	46.7
Coffee & tea	1.2	18.3
Pasta & cookies	(0.3)	28.7
Fruits & vegetables	(3.7)	25.2
Tequila	(13.8)	21.9
Fish & seafood	(17.7)	25.9
Vodka, whisky & gin	(27.7)	(3.0)
Brandy & wine	(58.9)	12.0

A study on food consumption prepared by the General Coordination of the National Plan for Depressed Zones and Minority Groups (Coplamar) estimates national food demand at 32 million tons annually, 21 of which are of vegetable origin (65%) and 11 of animal origin (35%). Average per capita consumption of food is estimated at 1,250 grams daily, and it was distributed as follows during 1988, as measured in kilograms per annum:

Rice	3.0 kg.
Corn	142.4 kg.
Wheat	49.3 kg.
Beans	14.2 kg.
Milk	113.7 kg.
Fish	8.7 kg.
Beef	14.0 kg.
Pork	12.6 kg.
Goat & sheep	0.8 kg.
Poultry	7.9 kg.
Eggs	13.8 kg.
Sesame	0.9 kg.
Safflower	3.3 kg.
Soya	15.8 kg.
Nuts	0.4 kg.
Avocado	6.1 kg.
Sugar	42.4 kg.

FRUITS	89.3 kg.
Peach	2.1 kg.
Strawberry	0.5 kg.
Lemon	8.0 kg.
Mango	10.5 kg.
Tangerine	1.1 kg.
Apple	4.9 kg.
Melon	5.5 kg.
Orange	25.3 kg.
Pear	0.1 kg.
Ananas	4.8 kg.
Banana	18.9 kg.
Grape	7.6 kg.

Differences in food consumption by income group are very significant. The low income population consumes an average 950 grams of food per day, as compared to 1,500 grams by the high income population. The diet of the first group consists of 83% vegetable products (half of which correspond to cereals) and 17% of animal products, while that of the second group is 54% vegetable and 46% animal.

The Mexico City-based finance and business magazine Expansión conducts a yearly study of the 500 most important Mexican companies, ranked according to sales. There are 32 food related companies within this list in 1991, which are listed below.

TABLE 7

SALES OF MEXICO'S TOP 500 COMPANIES RELATED TO THE FOOD & BEVERAGE INDUSTRIES
(billion pesos)

RANK	COMPANY NAME	1990 SALES
11	Cía. Nestlé	2,311
34	Anderson Clayton	773
46	Herdez	567
49	Ganaderos Productores de Leche Pura	547
64	Sigma-Alimentos	414
73	Univasa	373
100	Productos de Leche	238
105	Nabisco-Famosa	228
106	Lechera Guadalajara	226
119	Helados Holanda	192
125	Molinos Azteca	179
138	Ingenio Tres Valles	159
155	Ingenio Tamazula	131
161	Derivados de Maíz Alimenticio	120
168	Laboratorios y Agencias Unidas	115
174	Fábrica de Pastas Alimenticias la Moderna	112

175	Alimentos de Veracruz	110
185	Ingenio Adolfo López Mateos	103
229	Cía. Azucarera del Río Guayalejo	75
248	Cía. Industrial Azucarera Sn Pedro	65
264	Chocolatera de Jalisco	58
281	Citro México	51
288	Cía. Nacional de Harinas	49
302	Ingenio la Gloria	43
326	Martín Cubero	38
348	Alimentos de Baja California	34
357	Ingenio Sn Francisco el Naranjal	32
366	Zano Alimentos	30
390	Harinera los Pirineos	27
403	La Moderna de Occidente	24
422	Fábrica de Galletas la Moderna	22
497	Ceres Internacional de Semillas	11
TOTAL SALES		7,457

Source: Expansión, August 1991

Following is a list of Mexico's major companies/brands involved in the processing of food and the product lines they manufacture:

Aceite Casa	oil
Adams	confectionery
Alimentos Findus	frozen foods
Alpura	milk products
Anderson Clayton	oil, canned fruits&vegetables, tea dressings, margarine, jello, jams
Ann O'Brien	canned vegetables
Arancia	oil, jello
Café Int. de Córdoba	coffee
Campbell's	soups, frozen vegetables
Carnation	milk
Carrancedo	margarine
Cereales Industrializados	cereals
Cerezo	confectionery
Chalco	milk products
Clemente Jacques	canned vegetables & fruits, sauces
Club	milk products
Conservas San Miguel	canned vegetables & fruit
Conservas Sn.Miguel	canned vegetables
Continental de Alimentos	bread
Costeña	canned vegetables
Co'donga	rice & grains
Covemex	frozen vegetables
Danone	milk products
del Angel	confectionery
del Cid	snacks, nuts
del Fuerte	canned vegetables & fruits
del Monte	canned vegetables & fruits
Del Valle	fruit juices

DELSA	milk products
Digran	rice & grains
El Sauz	milk products
Elías Pando	canned fish & fruit
Elite	confectionery
Empacad. Jugos & Frutas	fruit juices
Filler	whole wheat bread
Formex Ybarra	oil, olives
Gamesa	pasta,crackers, cookies, cake mixes
Gerber	baby food
Herdez	canned vegetables, dressings, jams
Industrias Cor	milk products
Jugos y Frutas naturales	fruit juices
Kellogg's	cereals
Kraft General Foods	seasoning, sauces, milk products, jello, coffee, powdered beverages
La Azteca	cake mixes, confectionery, cereals
La Campiña	milk
La Caperucita	milk products
la Corona	oil
la Huerta	frozen vegetables
La Merced	rice & grains
La Moderna	pasta, crackers & cookies
La Risueña	milk products
Laguna	milk products
Lance	cookies & crackers, cake mixes
Mac Ma	pasta, cookies
Mafer	snacks, confectionery, nuts
Martín Cubero	snacks, nuts
Monte Blanco	canned mushrooms
Nabisco Famosa	cookies&crackers, cake mixes, jello
Nacional de Dulces	confectionery & chocolates
Nestlé	milk,sauces,inst. coffee, baby food
Noche Buena	milk products
Panificación Bimbo	bread, cakes
Pedro Domeq	vinegar
Perigord	mustard
Productos de Leche	milk products, margarine, jams
Productos de Maíz	oil, seasoning, dressings
Productos Marinela	sweet snacks
Reckitt & Colman	mustard
Rus Internacional	spices
Sabritas	snacks, confectionery
Texcoco	milk products
Tía Rosa - Suandy	sweet snacks & cakes
Turín	chocolates & confectionery
Verde Valle	rice & grains

5. MARKET ACCESS

As a result of Mexico's accession to GATT, the Mexican Government has gradually opened the economy to international suppliers. Import duties have been lowered from a maximum 100% in 1983, to

20% since December, 1988. The official import price system has been totally eliminated and import permits are required on only 325 of the total 11,950 items in the Mexican Tariff Act. Mexico adopted the Harmonized System of Tariff Nomenclature on July 1, 1988.

Imports of food processing and packaging equipment are subject to a 10% to 20% ad valorem duty assessed on the F.O.B. invoice value. In addition, a 0.8% customs processing fee is assessed on the invoice value. A 10% value added tax is then assessed on the cumulative value of invoice plus the above taxes.

There are no official metric requirements applicable to imports into Mexico, However, since the metric system is by law the official standard of weights and measures in Mexico, importers will usually require metric labeling (at least in the small stick-on back label) for packaged goods, although the Imperial system is also used. Dual labeling is acceptable. Electrical standards are the same as in Canada. Electric power is 60 cycles with normal voltage being 110, 220 and 400. Three phase and single phase 230 volt current is also available.

Prepared by:
Caroline Verut
for the Canadian Embassy
Mexico City
March 1992

APPENDIX I:
INDUSTRIAL CHAMBERS AND ASSOCIATIONS

ASOCIACION MEXICANA DE LA INDUSTRIA SALINERA, A.C.
MEXICAN SALT INDUSTRY ASSOCIATION
Tacuba 37-332
Col. Centro
06000 México D.F.
Phone: 518-36-53
Fax: 512-69-43
Contact: Lic. Elizabeth López Loza
Gerente

ASOCIACION NACIONAL DE FABRICANTES DE CAJAS Y EMPAQUES DE CARTON CORRUGADO Y FIBRA SOLIDA, A.C. (ANFE)
NATIONAL CARDBOARD AND SOLID FIBER BOXES AND PACKAGING MANUFACTURERS ASSOCIATION
Palmas 765-401
Col. Lomas de Chapultepec
11000 México D.F.
Phone: 520-08-35 540-27-24
Fax: 540-27-24
Contact: Lic. Joaquín Luna R.
Gerente

ASOCIACION NACIONAL DE FABRICANTES DE CHOCOLATES, DULCES Y SIMILARES, A.C.
NATIONAL CHOCOLATE, CANDY AND RELATED PRODUCTS MANUFACTURERS ASSOCIATION
Manuel Ma. Contreras 133-301
Col. Cuauhtémoc
06500 México D.F.
Phone: 546-12-59
Fax: 546-09-74
Contact: Lic. Noé Lecona S.
Gerente

ASOCIACION NACIONAL DE DISTRIBUIDORES DE DULCES, CIGARROS, CERILLOS Y SIMILARES, A.C.
NATIONAL CANDY, CIGARETTE, MATCHES AND RELATED PRODUCTS DISTRIBUTORS ASSOCIATION
Dr. Vértiz 1069
Col. Vértiz Narvarte
03600 México D.F.
Phone: 559-67-05 575-25-28
Fax: 575-25-28
Contact: Lic. Alejandro López Pedrosa
Gerente

ASOCIACION NACIONAL DE INDUSTRIALES DE ACEITES Y MANTECAS COMESTIBLES, A.C. (ANIAME)
NATIONAL OILS AND FATS INDUSTRIALISTS ASSOCIATION
Praga 39 - Piso 3
Col. Juárez
06600 México D.F.
Phone: 533-28-47 y 59
Fax: 525-51-24
Contact: Lic. Amado Ibarra H.
Director General

ASOCIACION NACIONAL DE TECNOLOGOS EN ALIMENTOS DE MEXICO, A.C. (ATAM)
NATIONAL ASSOCIATION OF FOOD TECHNOLOGISTS
Indianápolis 63-2
Col. Nápoles
03810 México D.F.
Phone: 536-42-01
Fax: 523-32-47
Contact: Q.F.B. Sergio Hernández S.
Presidente

ASOCIACION NACIONAL DE PRODUCTORES DE AGUAS ENVASADAS, A.C
NATIONAL BOTTLED WATER PRODUCERS ASSOCIATION
Reforma 195-1301
Col. Cuauhtémoc
06500 México D.F.
Phone: 566-22-44 566-23-59
Fax: 535-03-74
Contact: Lic. Luis Riva Rincón Gallardo
Director General*

ASOCIACION NACIONAL DE VITIVINICULTORES, A.C
NATIONAL WINE PRODUCERS ASSOCIATION
Tlalpan 3515
Col. Sta. Ursula Coapa
04650 México D.F.
Phone: 606-97-24
Fax: 606-51-53
Contact: Lic. Rafael Almada N.
Director General

CAMARA NACIONAL DE LA INDUSTRIA DE ACEITES Y GRASAS COMESTIBLES
NATIONAL EDIBLE OIL AND FATS INDUSTRY CHAMBER
Praga 39 - Piso 3
Col. Juárez
06600 México D.F.
Phone: 533-28-47
Fax: 525-51-24
Contact: Lic. Amadeo Ibarra Hallal
Director General

CAMARA NACIONAL DEL MAIZ INDUSTRIALIZADO
NATIONAL INDUSTRIALIZED CORN CHAMBER
Varsovia 44 - Piso 5
Col. Juárez
06600 México D.F.
Phone: 514-12-20 525-30-00
Fax: 533-07-04
Contact: Lic. Francisco Juárez H.
Gerente General

CAMARA NACIONAL DE LA INDUSTRIA DE RESTAURANTES Y ALIMENTOS CONDIMENTADOS (CANIRAC)
NATIONAL RESTAURANT AND SPICY FOODS INDUSTRY CHAMBER
Aniceto Ortega 1009
Col. del Valle
03100 México D.F.
Phone: 604-04-18 604-04-78
Fax: 604-40-86
Contact: Lic. José de la Luz Santibañéz C.
Presidente

CAMARA NACIONAL DE LA INDUSTRIA LECHERA (CANILEC)
NATIONAL MILK INDUSTRY CHAMBER
Benjamín Franklin 134
Col. Escandón
11800 México D.F.
Phone: 271-21-00 271-28-84
Fax: 271-37-98
Contact: Sra. Consuelo Saavedra A.
Gerente General

CAMARA NACIONAL DE LA INDUSTRIA PANIFICADORA Y SIMILARES (CANAIMPA)
NATIONAL BREAD AND RELATED PRODUCTS INDUSTRY CHAMBER
Dr. Licéaga 96 - P.B.
Col. Doctores
06720 México D.F.
Phone: 578-92-77 578-99-28
Fax: 761-89-24
Contact: Lic. José Luis Valenzuela A.
Director General

CAMARA NACIONAL DE LA INUSTRIA PESQUERA (CANAINPES)
NATIONAL FISHING INDUSTRY CHAMBER
Manuel Ma. Contreras 133-401 al 405
Col. San Rafael
06500 México D.F.
Phone: 546-52-34 566-94-11
Fax: 705-11-02
Contact: Lic. Alejandro Borja Márquez
Director General

CAMARA NACIONAL DE LAS INDUSTRIAS AZUCARERA Y ALCOHOLERA (CNIAA)
NATIONAL SUGAR AND ALCOHOL INDUSTRY CHAMBER
Río Niágara 11
Col. Cuauhtémoc
06500 México D.F.
Phone: 533-30-40 al 49
Fax: 511-78-03
Contact: C.P. Albino Lara V.
Director General

CAMARA NACIONAL DE LA INDUSTRIA DE CONSERVAS ALIMENTICIAS (CANAINCA)
NATIONAL CANNED FOODS INDUSTRY CHAMBER
Calderón de la Barca 359-200
Col. Polanco
11560 México D.F.
Phone: 203-95-87
Fax: 203-67-98
Contact: Lic. Alejandro Malo Aguirre
Director General

CAMARA NACIONAL DE LA INDUSTRIA DE LA CERVEZA Y DE LA MALTA
NATIONAL BEER AND MALT INDUSTRY CHAMBER
Horacio 1556
Col. Chapultepec Morales
11570 México D.F.
Phone: 520-62-83 al 85
Fax: 202-11-24
Contact: Sr. Roberto Cruces C.
Gerente

CAMARA REGIONAL DE LA INDUSTRIA TEQUILERA
REGIONAL TEQUILA INDUSTRY CHAMBER
Lázaro Cárdenas 3289 - Piso 5
Col. Chapalita
45000 Guadalajara, Jal.
Phone: (36) 21-50-21 21-50-66
Fax: (36) 47-20-31
Contact: C.P. Sergio Laguna L.
Gerente General

APPENDIX II:
USEFUL GOVERNMENT AGENCIES

COMPAÑIA NACIONAL DE SUBSISTENCIAS POPULARES (CONASUPO)
Av. Insurgentes Sur 489
Col. Hipódromo de la Condesa
06170 México D.F.

Lic. Javier Bonilla García
Director General
Phone: 272-26-14
Fax: 272-04-72

Lic. Norman Moreno
Director de Adquisiciones
Phone: 524-86-05

DISTRIBUIDORA CONASUPO DE SONORA, S.A. DE C.V.
Carr. Internacional a Guaymas Esq. Periférico Sur
Hermosillo, Son.

Lic. José de Jesús Martínez Cisneros
Gerente General Regional
Phone: (62) 12-43-08 17-44-10

DISTRIBUIDORA CONASUPO DEL CENTRO, S.A. DE C.V.
Carr. Nogales Esq. Periferico
Guadalajara, Jal.

Lic. Enrique Salazar Abaroa
Gerente General Regional
Phone: (36) 27-17-56
Fax: (36) 68-32-00

DISTRIBUIDORA CONASUPO DEL NORTE, S.A. DE C.V.
Carr. Monterrey-Laredo Km. 14.2
Gral. Escobedo, N.L.

C.P. Pedro Oliva Palacio
Gerente Regional
Phone: (83) 84-13-22

DISTRIBUIDORA CONASUPO DEL SUR, S.A. DE C.V.
Mártires del Río Blanco 7
Puebla, Pue.

Lic. Raúl Salazar García
Gerente General Regional
Phone: (22) 49-67-05
Fax: (22) 49-65-54

DISTRIBUIDORA CONASUPO DEL SURESTE, S.A. DE C.V.
Carr. Villahermosa-Frontera Km. 4
Col. Cd. Industrial
86010 Villahermosa, Tab.

Lic. Eddy Martínez Alarcón
Gerente General Regional
Phone: (931) 205-44 221-13
Fax: (931) 235-26

DISTRIIBUIDORA E IMPULSORA COMERCIAL CONASUPO S.A. DE C.V (DICONSA)
Av. Tamaulipas 150 - Piso 19
Col.Condesa
06140 México D.F.Av. Ferrocarril Hidalgo 1129

Lic. Julio César Ruíz Ferro
Director General
Phone: 286-58-70 286-58-72
Fax: 286-74-96

Lic. Octavio Mendoza Faugier
Gerente de Administración y Finanzas
Phone: 553-61-38 256-16-76

LECHE INDUSTRIALIZADA CONASUPO, S.A. DE C.V. (LICONSA)
Melchor Ocampo 479
Col. Anzures
11590 México D.F.

Dr. Aarón Schwartzman
Director General
Phone: 211-21-20
Fax: 514-15-00

Lic. Joaquín Solís Arías
Subdirector de Adquisiciones
Phone: 211-21-20 203-09-82

MAIZ INDUSTRIALIZADO CONASUPO, S.A. DE C.V.
Av. Nuevo León 56
Col. Hipodromo de la Condesa
06170 México D.F.

Ing. Efren Díaz Castellanos
Director General
Phone: 553-73-76 286-62-69
Fax: 286-77-64

Ing. Carlos Walter M.
Subdirector de Adquisiciones
Phone: 286-05-30 286-90-77

DISTRIBUIDORA A CONASUPO [illegible]
[illegible] del Rio Bravo [illegible]
[illegible], Tam.

Lic. [illegible]
[illegible]
Phone: [illegible]
Fax: [illegible]

DISTRIBUIDORA [illegible]
Carr. [illegible]
Col. [illegible]
[illegible]

Lic. [illegible]
Gerente [illegible]
Phone: [illegible]
Fax: [illegible]

DISTRIBUIDORA E IMPULSORA COMERCIAL CONASUPO S.A. DE C.V
(DICONSA)
Av. Tamaulipas [illegible] - Piso [illegible]
Col. Condesa
06140 México D.F Av. Ferrocarril Hidalgo 1175

Lic. Julio César [illegible] Farro
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Phone: 286-58-70 286-68-72
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Gerente de Administración y Finanzas
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Dr. Aarón Schwartzman
Director General
Phone: 211-21-20
Fax: 514-15-00

Lic. Joaquín Solís Arias
Subdirector de Adquisiciones
Phone: 211-21-20 203-09-62

APPENDIX III:
POTENTIAL DISTRIBUTORS AND REPRESENTATIVES

ABAMEX INGENIERIA, S.A. DE C.V.
Av. de las Torres 474
Col. Nueva Industrial Vallejo
07700 México D.F.
Phone: 754-15-00 754-15-02
Fax: 752-10-35
Contact: Lic. Gregorio J. Porchini C.
Presidente
(food processing & packaging equipment)

ALFA LAVAL, S.A. DE C.V.
Río Lerma 22
54030, Tlalnepantla, Edo. de Mex.
Phone: 565-38-00
Fax: 565-55-44
Contact: Ing. Jan Ehrnberg
Director General
(food industry equipment)

ALUPLAST, S.A. DE C.V.
Calle 40 - S
Civac
62500 Jiutepec, Mor.
Phone: (73) 551-53
Contact: Augusto César
Director General
(packaging industry equipment)

AMERICAN REFRIGERATION PRODUCTS, S.A. DE C.V.
Arroz 166
Col. Sta. Isabel Industrial
09820 México D.F.
Phone: 582-29-00
Fax: 582-95-22
Contact: W. Bryan Johnson
Presidente
(refrigeration)

APV CREPACO DE MEXICO, S.A. DE C.V.
Blvd. M. Avila Camacho 40-311
Col. El Parque
53390 Naucalpan, Mex.
Phone: 395-16-93
Fax: 395-01-56
Contact: José Montaño
Director General
(food processing equipment)

ATLANTIDA MEXICO, S.A.
Fernando de Alva Ixtlixochitl 44 - 16
Col. Obrera
06800 México D.F.
Phone: 578-48-44
Fax: 761-69-50
Contact: Gunther Apel
Director General
(food processing equipment)

C. ITOH & COMPANY DE MEXICO, S.A. DE C.V.
Paseo de la Reforma 295 - Piso 8
Col. Cuauhtémoc
06550 México D.F.
Phone: 533-61-80
Fax: 514-34-30
Contact: Sr. Isao Miki Kitamura
Presidente
(food industry equipment)

CAFETERAS NACIONAL, S.A. DE C.V.
Calle del Río 14
Fracc. Industrial Alce Blanco
53370 Naucalpan, Mex.
Phone: 360-05-59 360-17-40
Fax: 359-03-46
Contact: C.P. Justo J. Torres Marín
Director General
(coffee & ice making machines

CARTONAJES ESTRELLA, S.A. DE C.V.
Poniente 122 No. 430
Col. Industrial Vallejo
02300 México D.F.
Phone: 587-61-66
Fax: 567-04-34
Contact: Sr. Adolfo Carriles Koll
Gerente General
(packaging machinery)

COMTESA, S.A.
Tonalá 121-201
Col. Roma
06700 México D.F.
Phone: 584-46-66
Fax: 564-36-20
Contact: Carlos Stutz Meyer
Director General
(food prcessing & packaging equipment)

CONNOR COMERCIAL, S.A.
Miramontes 60
Col. Ejidos de Huipulco
14380 México D.F.
Phone: 673-02-22 673-18-75
Fax: 594-25-07
Contact: Federico Estacpoole
Director General
(confectionery & chocolate making equipment)

CROWN CORK DE MEXICO, S.A.
Poniente 134 No. 583
Col. Industrial Vallejo
02300 México D.F.
Phone: 567-29-44
Fax: 587-85-98
Contact: Oscar F. Francke B.
Presidente
(bottling industry equipment)

DE SMET MEXICO, S.A. DE C.V.
Florencia 37 - Piso 4
Col. Juárez
06600 México D.F.
Phone: 533-40-24 525-47-13
Fax: 207-84-22
Contact: Sr. Alfredo Parres
Director General
(oils & fats manufacturing equipment)

DISTRIBUIDORA FISCHBEIN, S.A.
Av. Alemán 1616
Guadalajara, Jal.
Phone: (36) 12-46-21
Fax: (36) 12-39-21
Contact: Victor H. Hernández
Director General
(packaging equipment)

EFFIX, S.A. DE C.V.
Moras 430
Col. del Valle
03100 México D.F.
Phone: 559-65-90 559-26-00
Fax: 559-65-64
Contact: Sr. Juergen Ziebe
Director General
(meat processing & packaging equipment)

EMPAC, S.A. DE C.V.
Canarias 518
Col. Portales
03300 México D.F.
Phone: 672-70-77 532-16-77
Fax: 539-54-37
Contact: Ing. Héctor Franco R.
Director General
(wine & liquor packaging equipment)

ENVASES MULTIPAC, S.A. DE C.V.
Emilio Cárdenas 166
Col. Centro Industrial Tlalnepantla
54030 Tlalnepantla, Mex.
Phone: 390-59-54
Fax: 390-59-89
Contact: Lic. Alfredo Ciklik
Director General
(packaging equipment)

ENV-A-FLEX (SOCIEDAD INDUSTRIAL MEXICANA)
Recreo 47-A
Col. Zapotlán
08610 México D.F.
Phone: 590-46-80 579-36-15
Fax: 590-46-23
Contact: Ing. Gregorio Pérez Palacios
Director General
(automatic filling equipment)

FABRICACION, MAQUINARIA Y CERAS, S.A. DE C.V.
Antonio Garza Elizondo 1980 Ote.
Col. Reforma
64550 Monterrey, N.L.
Phone: (83) 74-13-38
Contact: A.J. Calderón
Director General
(food processing & packaging equipment)

FRENCH DE MEXICO, S.A. DE C.V.
Matamoros 311 Ote. - Piso 6
Edif. Nvo. Mundo
Col. Niño Artillero
64000 Monterrey, N.L.
Phone: (83) 42-10-24
Fax: (83) 42-42-91
Contact: Gabriel Briones
Gerente General
(oil industry machinery)

GRUPO TORREY
Av.Los Angeles 2904 - Oriente A
Col. Industrial Nogalar
66480 Sn. Nicolás de los Garza, N.L.
Phone: (83) 51-33-40
Fax: (83) 51-47-63
Contact: Ing. Juan G. Rodríguez
Director General
(meat slicers, refrigerators)

IMPULSORA DE REFRIGERACION, S.A. DE C.V.
Calle 70 No. 571
Sector Libertad
44730 Guadalajara, Jal.
Phone: (36) 43-40-43 43-00-37
Contact: Germán Martínez R.
Gerente General
(refrigeration)

INDUSTRIAS CAVAZOS, S.A.
Abasolo 2154 Oriente
27000 Torreón, Coah.
Phone: (17) 13-14-00 13-14-52
Contact: Luis Cavazos H.
Director General
(transportation refrigeration)

INDUSTRIAS JOHN CRANE DE MEXICO, S.A. DE C.V.
Poniente 152 No. 679
Col. Industrial Vallejo
02300 México D.F.
Phone: 567-45-77 567-24-03
Fax: 587-23-42
Contact: Ing. Enrique del Valle
Gerente General
(packaging equipment)

INGENIERIA SIGMA, S.A. DE C.V.
Ejército Nacional 752
Col. Chapultepec Polanco
11550 México D.F.
Phone: 254-23-88
Fax: 531-66-81
Contact: Ing. Javier Chávez
Gerente de Ventas
(handling equipment)

LABELETTE DE MEXICO
Playa Cuyután 257
Col. Reforma Iztaccíhuatl
08810 México D.F.
Phone: 579-81-44
Fax: 696-08-34
Contact: Kees Pents
Director General
(labellers)

MAPISA INTERNACIONAL, S.A. DE C.V.
Eje 5 Ote. Rojo Gómez 424
Col. Agrícola Oriental
08500 México D.F.
Phone: 558-10-44 558-06-22
Fax: 558-20-25
Contact: Ing. Francisco Montero
Director General
(food processing & packaging equipment)

MAQUINARIA Y ACCESORIOS, S.A. DE C.V.
Cincinnati 81 - Piso 4
Col. Nápoles
03720 México D.F.
Phone: 563-81-88
Fax: 563-85-90
Contact: Sr. Gerhard Hoffman
Director General
(food processing & packaging equipment)

MAQUINARIA PARA EMPAQUE Y CONVERSION, S.A. DE C.V.
Lago Ginebra 10
Col. Anáhuac
11320 México D.F.
Phone: 531-03-73
Fax: 254-60-17
Contact: Antonio Prado
Gerente General
(packaging equipment)

MAQUINDAL, S.A. DE C.V.
Av. Henry Ford 335 y 341
Col. Bondojito
07850 México D.F.
Phone: 760-49-83
Fax: 751-04-86
Contact: Ing. Roberto Martínez
Gerente General
(food industry equipment)

MECANICA SERVICIO, S.A. DE C.V.
Francisco Novoa 71
Col. Aragón
07000 México D.F.
Phone: 781-27-99 577-32-08
Fax: 781-26-03
Contact: Ing. Jorge Pimentel
Director General
(soft drinks machinery)

MEXICANA DE INGENIERIA Y MAQUINARIA, S.A. DE C.V.
Avena 13
Col. Granjas Esmeralda
09810 México D.F.
Phone: 582-00-05 582-28-61
Fax: 582-11-33
Contact: Ing. Enrique J. Grisi
Director General
(packaging equipment)

PLASTIEMPAQUES, S.A. DE C.V.
Av. de los Laureles 183
Col. Tepeyac
45100 Zapopan, Jal.
Phone: (36) 33-24-11 33-24-63
Fax: (36) 41-04-64
Contact: Lic. Raúl Medina A.
Director General
(packaging)

PRODUCTORA DE ARTICULOS DE CELULOSA KEYES, S.A. DE C.V.
Blvd. Adolfo López Mateos 165
Col. Los Alpes
01010 México, D.F.
Phone: 680-71-99
Fax: 680-74-60
Contact: Ing. Pablo de la Macorra
Director General
(plastic packaging)

PRODUCTOS NEUMATICOS, S.A. DE C.V.
Calz. de la Naranja 129
Fracc. Alce Blanco
53370 Naucalpan, Mex.
Phone: 358-21-99
Fax: 576-37-34
Contact: Ing. Jorge Ramírez C.
Gerente General
(tools for the food indsutry)

PROVEEDORES DE EMPACADORAS, S.A.
Monterrey 420
Col. Roma
03000 México D.F.
Phone: 536-50-40
Fax: 536-34-34
Contact: Lic. Oscar Flores
Director General
(food processing equipment)

REHMEX, S.A. DE C.V.
Lago Mask 229
Col. Anáhuac
11320 México D.F.
Phone: 531-53-19 545-31-94
Fax: 203-91-64
Contact: Ing. Roberto Tietzsch
Director General
(food industry equipment)

R.R. REFRIGERACION, S.A. DE C.V.
Av. Gustavo Baz 393
Col. La Florida
53160 Naucalpan, Mex.
Phone: 393-34-22 393-39-70
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Gerente General
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